Building & Asset Services Web Portal User Guide

A guide for conducting business online

Rev 3 (June 2013)

Queensland Government

Welcome to eBusiness!

A secure, online web application, the BAS Web Portal allows clients to:

- request work online
- receive notifications about work
- receive BAS Customer Job Statements
- receive electronic invoices *(feature available soon)*
- receive electronic quotes *(feature available soon)*
- update asset details, and:
- access program, budget and expenditure reports online

About BAS's e-Business solution

The solution is comprised of two main online components:

BAS Web Portal

Clients can access online reports relating to programs, budgets and expenditure. *(For more information on the BAS Web Portal, jump to Section 3.1 of this guide).*

BAS Web View

This is an additional Web Portal feature where clients can perform online work requests, asset updates, receive quotes, invoices, job statements and work status notifications.

Advanced features

Clients wishing to use the advanced features in Web View can register users by contacting their BAS Client Program Manager. *(For more information on the BAS Web Portal, jump to Section 5.1 of this user guide).*

Note:

You can still interact with us using existing methods of transaction, but we encourage you to make use of this new technology.

This user reference guide will provide further detail and instructions about accessing and using the BAS Web Portal and BAS Web View.

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1. Help and registration

Clients must be registered to enjoy the benefits of using e-business through the BAS Web Portal. If you are unsure of your registration details or if you are having difficulty using the BAS Web Portal, please contact your Client Program Manager at BAS Head Office.

2. What can you do using the BAS Web Portal?

There are three main components of the BAS Web Portal.

1. Web Portal Client Reporting *(available through the Web Portal)*

This includes a suite of standard reports for clients to access, including information on program, budget and expenditure status. This function will also allow you to view the status of your requested work.

2. Web View BAS Business Online *(available through Web View)*

This is a secure environment for clients to conduct online business with BAS. Users can access this application through the Web Portal using a log in and password issued by BAS.

BAS Business Online enables registered users to:

- raise a work request
- manage requests for work using the inbox
- receive and approve or reject BAS customer job statements
- receive and approve or reject quotes *(this feature not yet available)*
- create asset updates
- review and respond to condition assessment notifications
- receive invoices.

3. Administration *(available through Web View)*

This function allows users to create and maintain new folders within an electronic filing system.

3. Getting started

3.1 Logging in to the Web Portal

You must be registered to access the BAS Web Portal. For more information on how to register, refer to the ‘Help and registration’ section at the beginning of this guide.

Add the Department of Housing and Public Works website to your Internet ‘favourites’ folder - www.hpw.qld.gov.au

How to log in to the BAS Web Portal

Step 1

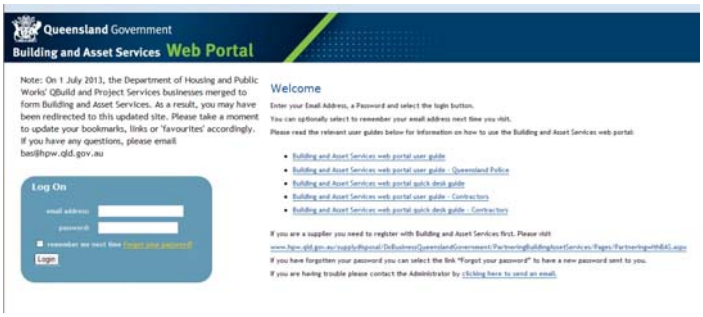
Go to the Department of Housing and Public Works website www.hpw.qld.gov.au. Click on ***Clients Web Portal*** under the ***BAS Logins*** dropdown from the home page.

Step 2

Log in to the BAS Web Portal using your user name and password. Click the login button.

Login

Your user name and password will be provided via email upon registration.

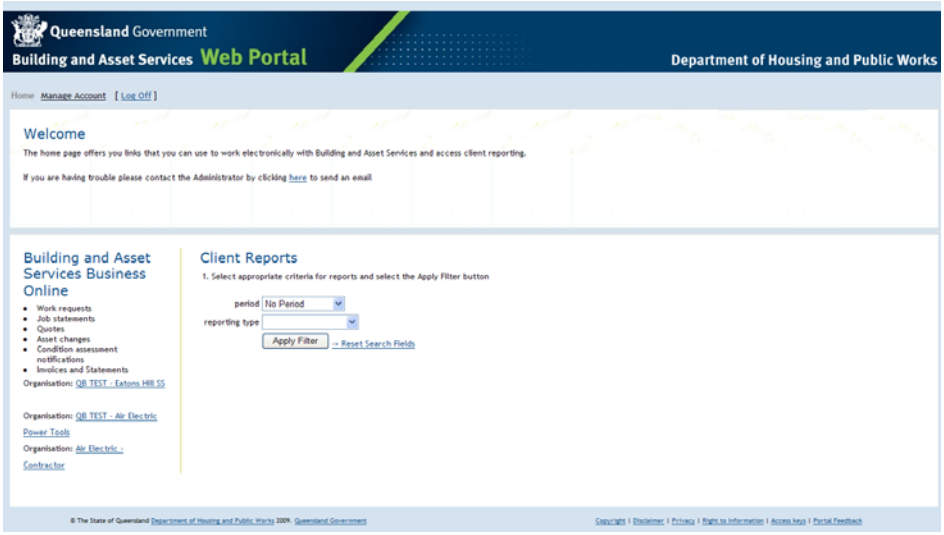


Step 3

If you've forgotten your password, click the **Forgot Password** link and a temporary password will be emailed to you.

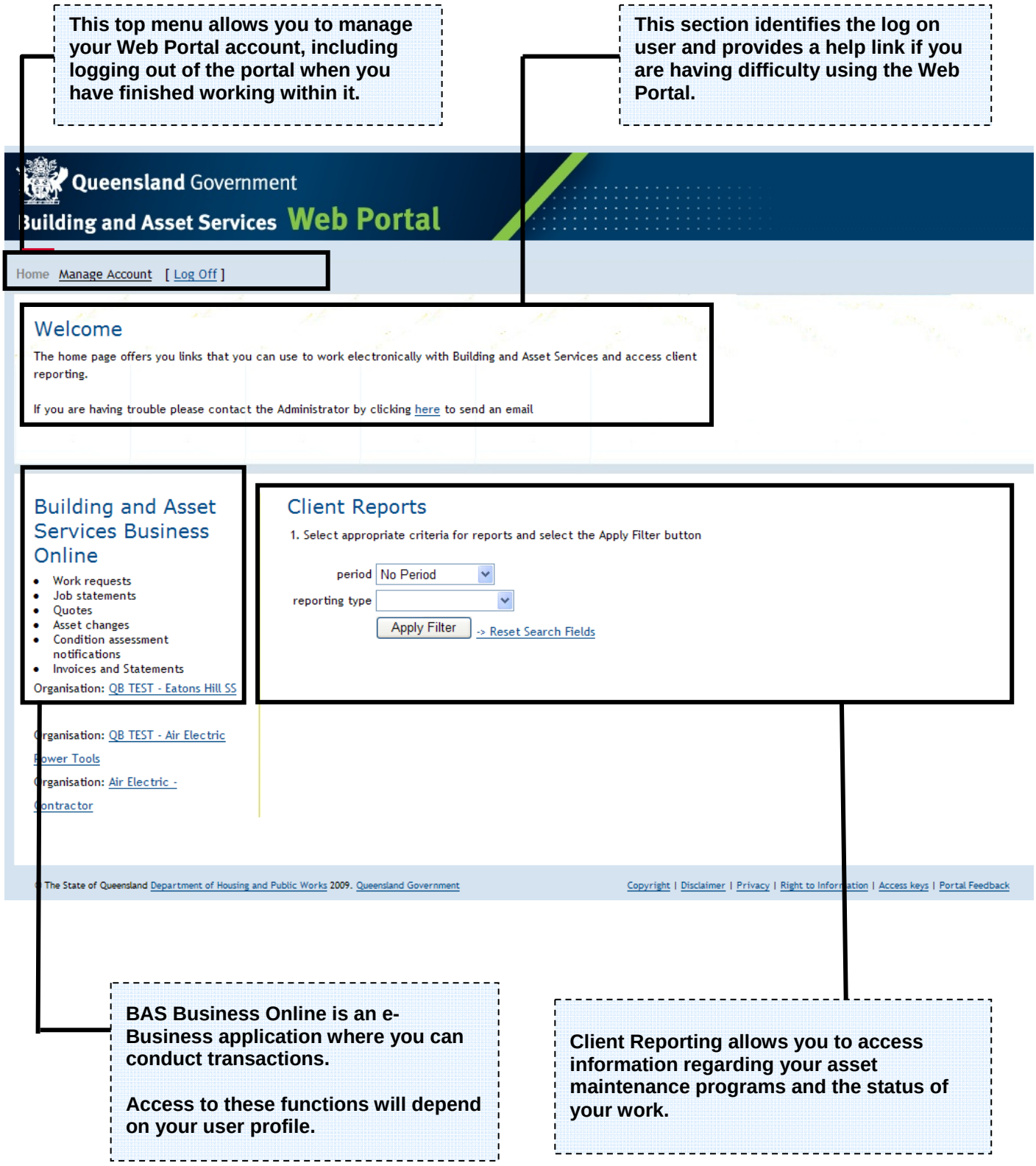
Step 4

You will automatically be taken to the BAS Web Portal home page.



3.2 Navigating the BAS Web Portal

The following diagram outlines the components of the BAS Web Portal. More detail is given throughout this guide.


This top menu allows you to manage your Web Portal account, including logging out of the portal when you have finished working within it.
This section identifies the log on user and provides a help link if you are having difficulty using the Web Portal.
Queensland Government
Building and Asset Services Web Portal
Home Manage Account [Log Off]
Welcome
The home page offers you links that you can use to work electronically with Building and Asset Services and access client reporting.
If you are having trouble please contact the Administrator by clicking here to send an email
Building and Asset Services Business Online
Work requests
Job statements
Quotes
Asset changes
Condition assessment notifications
Invoices and Statements
Organisation: QB TEST - Eatons Hill SS
Organisation: QB TEST - Air Electric Power Tools
Organisation: Air Electric - Contractor
Client Reports
1. Select appropriate criteria for reports and select the Apply Filter button
period No Period
reporting type
Apply Filter -> Reset Search Fields
© The State of Queensland Department of Housing and Public Works 2009. Queensland Government
Copyright | Disclaimer | Privacy | Right to Information | Access keys | Portal Feedback
BAS Business Online is an e-Business application where you can conduct transactions.
Access to these functions will depend on your user profile.
Client Reporting allows you to access information regarding your asset maintenance programs and the status of your work.

4. Using client reports

The reports you will be able to access depends on the following:

- your department's reporting requirements and your department's agreement with BAS
- your access rights to the system *(based on those agreements)*
- the availability of reports *(reports will be introduced progressively).*

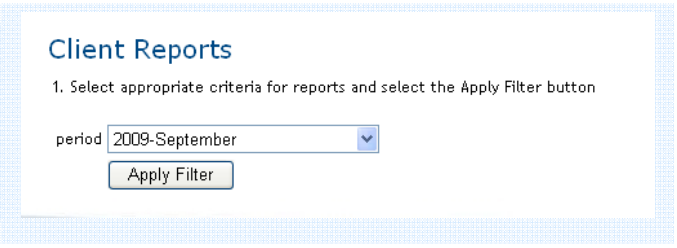
4.1 Reviewing available reports

Once you are logged in to the BAS Web Portal, the following steps will help you access and review your client reports.

Step 1

From the BAS Web Portal home page, select the applicable reporting period from the drop down box.

Click on the **Apply Filter** button.

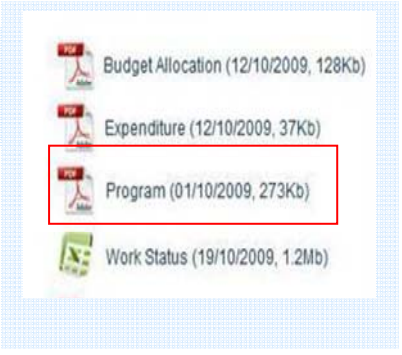


Step 2

The reports available to you for the period you have selected will be displayed.

Step 3

To access a report, double click on the file you want to download.



5. Using Web View - BAS Business Online

5.1 Logging in to BAS Business Online

Web View *BAS Business Online* is an additional application within the Web Portal and requires additional registration by clients. For more information on how to register, refer to the 'Help and registration' section at the beginning of this guide.

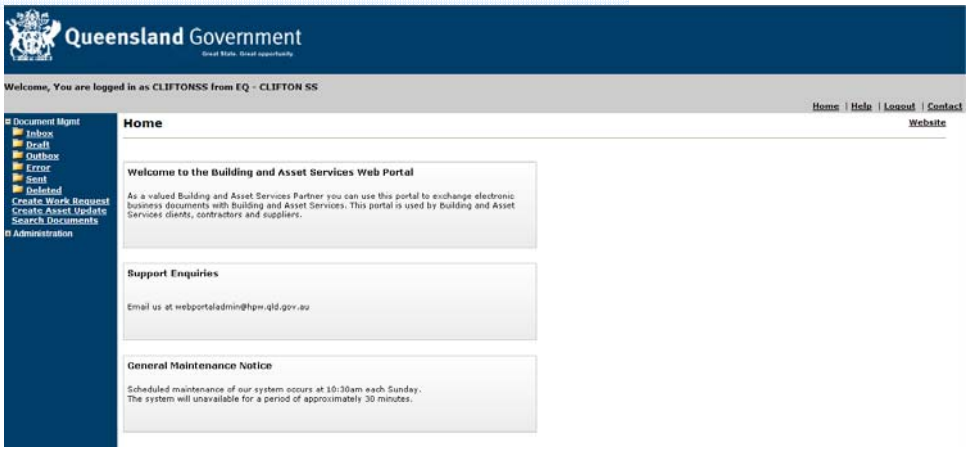
Step 1

Go to BAS Web Portal home page and click on the organisation link under the ***BAS Business Online*** menu.

⚠ If the ***BAS Business Online*** menu is not visible on your Web Portal home page you do not have access to this application.

Step 2

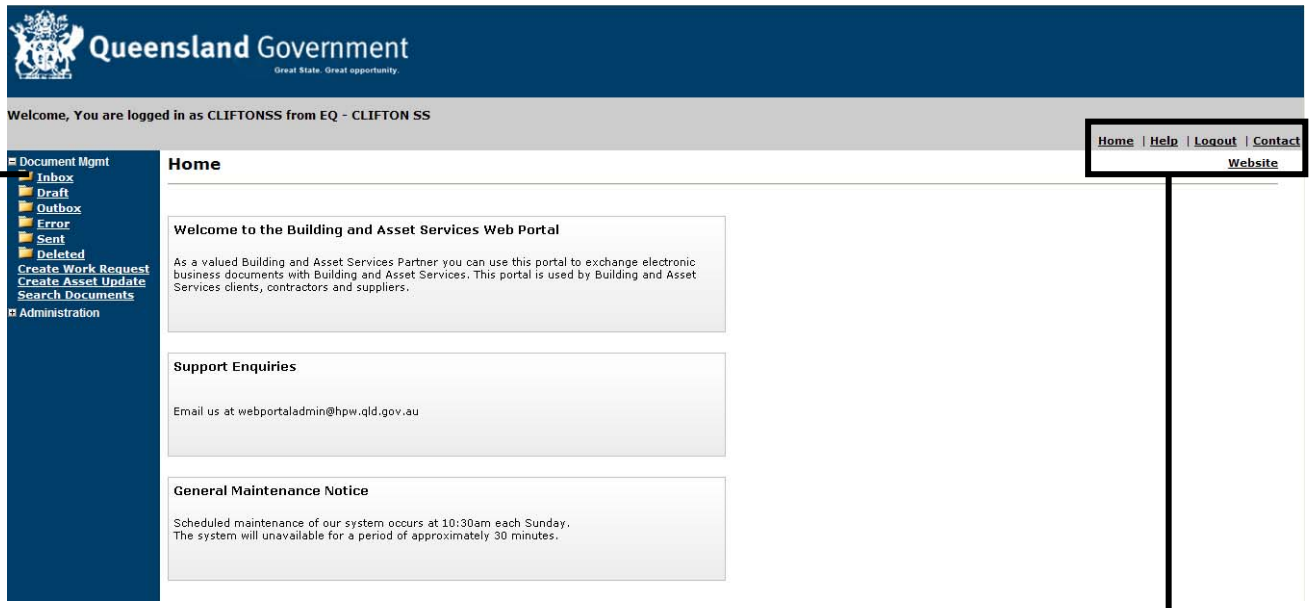
You will automatically be taken to the home page of the ***BAS Business Online*** portal.

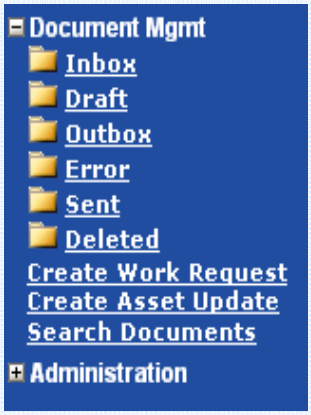

Queensland Government
Welcome, You are logged in as CLIFTONSS from EQ - CLIFTON SS
Home | Help | Logout | Contact
Website
Document Mgmt
Inbox
Draft
Outbox
Error
Sent
Deleted
Create Work Request
Create Asset Update
Search Documents
Administration
Home
Welcome to the Building and Asset Services Web Portal
As a valued Building and Asset Services Partner you can use this portal to exchange electronic business documents with Building and Asset Services. This portal is used by Building and Asset Services clients, contractors and suppliers.
Support Enquiries
Email us at webportaladmin@hpw.qld.gov.au
General Maintenance Notice
Scheduled maintenance of our system occurs at 10:30am each Sunday.
The system will unavailable for a period of approximately 30 minutes.

5.2 Navigating BAS Business Online

After logging in, you will be presented with the ***BAS Business Online*** home page. The home page contains three text boxes on the main viewing panel where you can view any news or notices from BAS.

The home page also displays two menus, as shown below.


Queensland Government
Great State. Great opportunity.
Welcome, You are logged in as CLIFTONSS from EQ - CLIFTON SS
Home | Help | Logout | Contact
Website
Document Mgmt
Inbox
Draft
Outbox
Error
Sent
Deleted
Create Work Request
Create Asset Update
Search Documents
Administration
Home
Welcome to the Building and Asset Services Web Portal
As a valued Building and Asset Services Partner you can use this portal to exchange electronic business documents with Building and Asset Services. This portal is used by Building and Asset Services clients, contractors and suppliers.
Support Enquiries
Email us at webportaladmin@hpw.qld.gov.au
General Maintenance Notice
Scheduled maintenance of our system occurs at 10:30am each Sunday.
The system will unavailable for a period of approximately 30 minutes.



On the left hand side is the ***navigation menu***, which lists all the functions and folders containing the business documents and notifications.

For more information refer to section 5.2.1.

On the top right hand side is the ***activity menu***. This menu lets you select the activity.

The activities menu will differ depending on the function, or the folder you are working in.

For more information refer to section 5.2.2.

5.2.1 Navigation menu

The ***navigation menu*** is an electronic file management system where you can view and maintain your online business transactions with BAS. The below table details the core functions of each menu item.

Inbox	The ***Inbox*** shows a list of active documents sent to you from BAS's system. The following information is displayed for each document: • Document Number • Document Version • Document Type • Document Status • From • Date the document was received To view a document in detail, click on the Document Number from the list.
Draft	Any document you start within ***BAS Business Online*** can be saved at any time and stored in the ***Draft*** folder so you can return to it later.
Outbox	Documents you send are temporarily held in the ***Outbox*** folder until they are sent electronically to BAS.
Error	A message will appear in the ***Error*** folder if a problem has occurred with sending a document to BAS.
Sent	The ***Sent*** folder stores all documents that have been successfully sent to BAS. If the document you have sent is not here, check the ***Outbox*** or ***Error*** folders.
Deleted	This folder contains any ***Deleted*** documents.
Archive	You can organise this folder to store your documents.
Create work request	This link launches the online form to create a new ***Work Request***.
Create asset update	This opens the online form to create or amend asset details.
Search documents	Search for documents using this form.
Administration	This menu item will open a selection of activities to administer your ***BAS Business Online*** account. This includes the ability to create and modify new folders to manage your documents.

5.2.2 Activity menu

Back	Go back to the previous screen.
Back to document	Go back to the document.
Create copy	Save time and copy a previously created document to form a template for a similar document (e.g. work request that is similar to the new request you want to create).
Delete	To remove the record. (Any item deleted will be moved to the delete folder).
Export	Export the information on the screen to xml format.
Help	This field will take you to the electronic version of this quick reference guide.
Home	This field will take you to the ***BAS Business Online*** home page.
Logout	It is important to log out correctly when you have finished working in this application. Click ***Logout*** each time before you exit the application.
Modify	You can create new folders in which to store and manage documents. You can also modify the names of folders.
New search	Perform a new search.
Print	Print a document.
Save	Save a document to the ***Draft*** folder.
Send	Sends the document electronically to BAS.
Submit	Submits your request to search for documents based on the criteria specified.
Website	This will open the BAS website.

5.2.3 Descriptions: other functions and activity

Within the ***BAS Business Online*** application, you will have access to some other functions which are explained in the table below:

View full details	To view all the details of the notifications received from BAS, click on the ***View Full Details*** button to open a document with all the information required. This document can be saved and/or printed.
View audit details	***Audit details*** list the details of transactions (and who performed them) relating to a selected document.
Document flow	The ***Document Flow*** lists all of the transactions that relate to the document for tracking purposes.
Document history	The document history provides a list of the documents relating to the work request, including version numbers.
Send response	You have the ability to respond to documents/notifications received. To respond to the document, select your response status, provide BAS with any relevant commentary and click on the ***Send Response*** button.

5.3 Create a work request

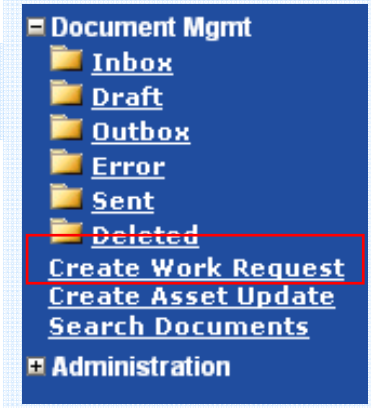
5.3.1 Purpose

Work Requests can be completed and submitted to BAS online using the ***BAS Business Online*** application.

5.3.2 How to create a work request?

Step 1

Click on **Create Work Request** from the navigation menu.

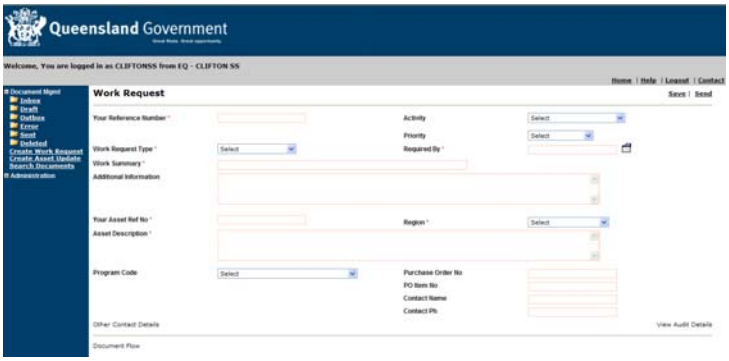


Step 2

An online **Work Request** form will open on your main display screen.

Details on how to complete your online **Work Request** are outlined on the following page.

Fields marked with a red asterisk are mandatory.



5.3.3 Field descriptions: create work request

You can save the work request at any time and a draft will be saved in the *Draft* folder. When you are ready to complete the work request you can retrieve it from the *Draft* folder.

Field	Description
Your reference number*	This is a free text field where you can enter your own reference number.
Work request type*	**Select the work request type from the drop down menu**. Building maintenance – breakdown (responsive) maintenance Complaint – comment for BAS Intentional damage – work resulting from vandal damage Planned maintenance – planned work Special program – works identified as part of a special program of work
Work summary*	Provide a brief summary of the work required. *(Please note this field has a limit of 80 characters.)*
Additional information	Further details of the work required can be inputted here. The more detail you provide in your online requests, the quicker they can be processed.
Your asset reference no*	Enter your asset reference number here, e.g. WIC number, SAP identifier.
Asset description	Enter a description of the asset such as the building number, street address or both *(e.g. Building 004 K Block, 124 Smith Street, Gracemere).* You can also reference any important information regarding the assent that BAS may require *(e.g. entry via Adams Street or Building used for out of hours care etc.)*
Program code*	Select from the list of programs applicable to your department. The ***program code*** relates to the funding source. Selecting a ***program code*** will provide clear direction to BAS on what program your requested work will be billed from.
Activity	Select the type of work you are requesting from the drop down list.
Priority	If the work related to responsive maintenance, then please select the response priority for the work *(e.g. 4 hrs; 24 hrs; 14 days).*
Required by*	Enter a date or use the calendar to propose a date the work is required by.
Region	Select your ***BAS region.*** You can confirm the BAS region by referring to Appendix A at the back of this guide.
Purchase order no.	You may include a purchase order number here for the work to be completed.
PO item no	If you have entered a purchase order number, include the item number here.
Contact name	Enter the name of the person BAS should contact should further information be required.
Contact phone	Enter the phone number of the person BAS should contact should further information be required.

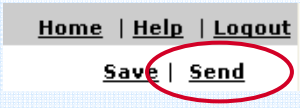
NOTE: Fields marked with a red asterisk are system-mandatory fields.

5.3.4 Submitting a work request

Once you have created your work request you can submit the document to BAS Online.

Step 1

Submit the **Work Request** document to BAS by clicking on **Send** in your ***activity menu*** at the top right of your screen.



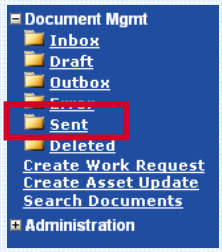
5.4 Tracking and managing work request documents

5.4.1 Navigating the sent folder

All work requests successfully sent to BAS will reside in your ***Sent*** folder.

Step 1

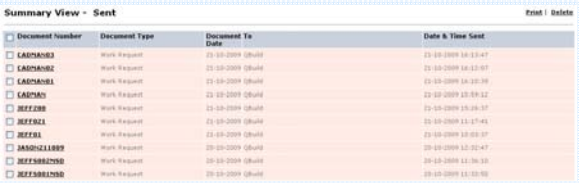
When the **Work Request** has been successfully sent you will be able to retrieve it from your **Sent** folder.



Step 2

A list of all sent items will appear.

Click on the document number link to open the **Work Request.**



Step 3

Opening this document will reveal the BAS **Work Request** number.

5.4.2 Field descriptions: sent folder

Field	Description
	Select one or multiple documents by clicking on the check box.
Document number	The ***Document Number*** is the reference number you provided on your ***Work Request***.
Document type	This identifies what type of notification has been sent.
Document date	This indicates the date the document was created.
To	This will always say BAS.
Date and time sent	This will indicate when the document was sent to BAS.

5.4.3 Navigating the inbox

All notifications in relation to a single work request will be sent from BAS and reside in your ***Inbox***.
Click on the document number to open the work request.

Summary View - Inbox

Document Number	Version Number	Document Type	Document Date	Document Status	From	Date Received
CADMAN03	1	Work Request Status	21-10-2009	ACTIVE	QBuild	21-10-2009 16:58:07
CADMAN02	1	Work Request Status	21-10-2009	ACTIVE	QBuild	21-10-2009 16:57:35
CADMAN01	1	Work Request Status	21-10-2009	ACTIVE	QBuild	21-10-2009 16:57:12
CADMAN	1	Work Request Status	21-10-2009	ACTIVE	QBuild	21-10-2009 15:59:46
JEFF200	1	Work Request Status	21-10-2009	ACTIVE	QBuild	21-10-2009 15:27:14
JEFF021	5	Work Request Status	21-10-2009	ACTIVE	QBuild	21-10-2009 11:25:52

5.4.4 Field descriptions: inbox

Field	Description
☐	To select multiple documents click on the check box.
Document number	The document is your reference number as entered on the original work request. If it is a BAS generated document this document number will be the work request number generated by the BAS system.
Version number	Each notification sent to you will be given a version number so you can see which notification is the most recent.
Document type	This identifies what type of notification has been sent.
Document date	This indicates the date the document was created.
Document status	Document status will be one of the following: • active • inactive • closed
From	Identifies the sender of the document.
Date received	Date the document was received in your account.

5.5 Accessing notifications

5.5.1 Purpose

Notifications are generated by BAS and provide information regarding work that is scheduled to occur. You will have the ability to respond to the information provided in the notification, save and or print the documents for your records, and follow the history of the document and any changes made to the information.

The different types of notifications you may receive are:

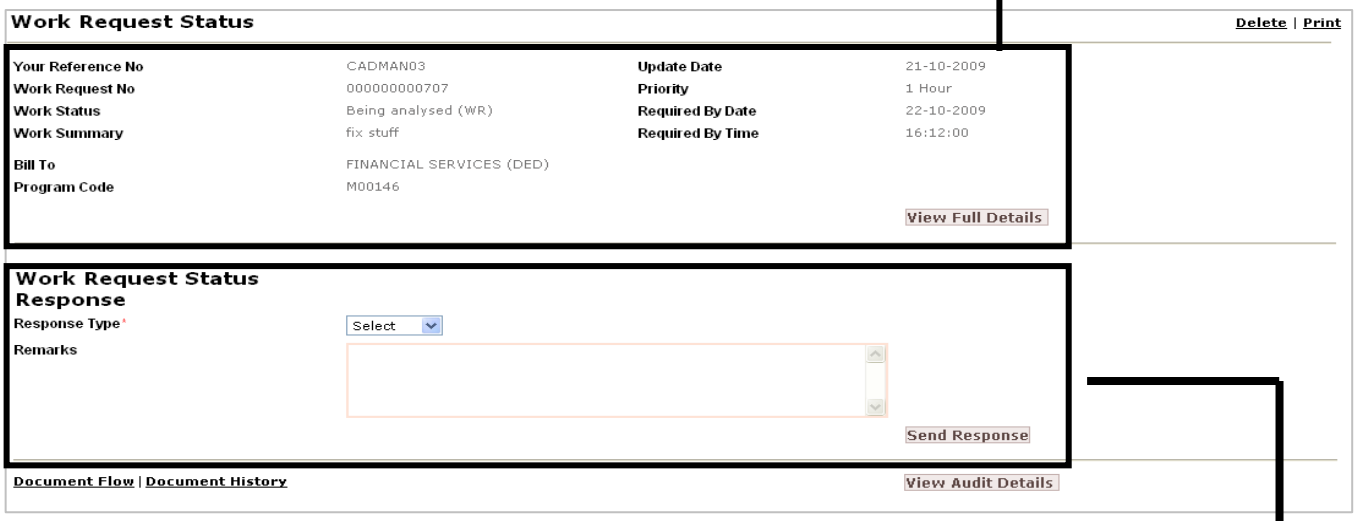
- Work Request Status
- Work Request Quote
- BAS Customer Job Statement
- Condition Assessment Notification.

The types of notifications you receive will be dependant on your department's agreement with BAS.

5.5.2 Navigating notifications

All notifications have a header section containing high level detail of the notification, a *View Full Details* link to access the document and a response section.

The top section provides you the high level detail of the notification. To view the full details of the notification click on the **View Full Details** link for the document.



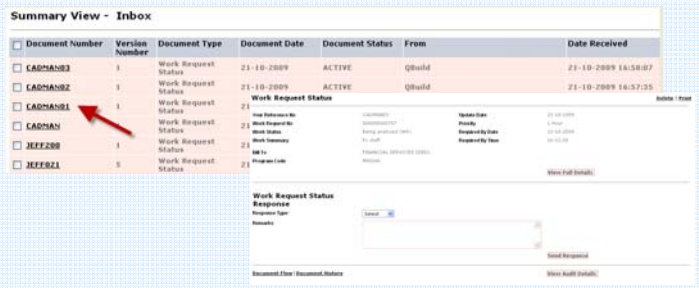
The bottom section allows you to respond to the notification. When you are ready, click on the **Send Response** button and your response type and remarks will be forwarded to BAS for action.

5.5.3 Work request status notification

All ***Work Request Status*** notifications will reside in your ***Inbox***.
They will be identified as a ***Work Request Status*** document type.

Step 1

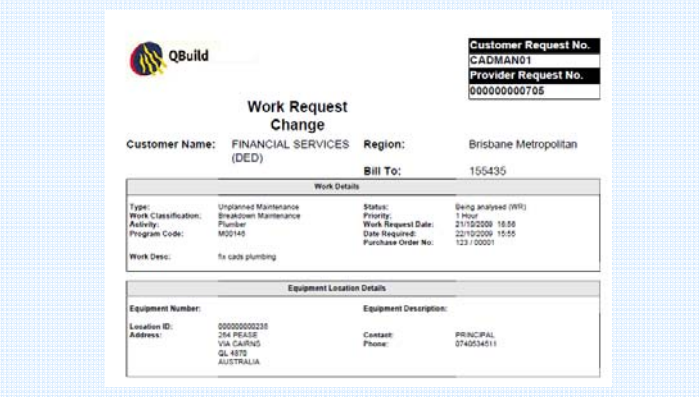
Click on the document number to open the work request status notification.



Step 2

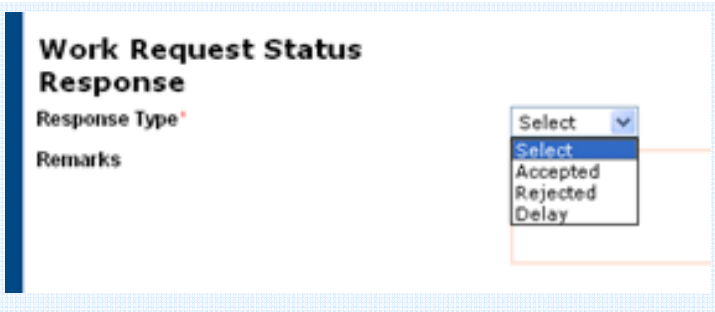
To view the full details of the notification click the **View Full Details** link.

This will display a document with all the details of the work request for your review.



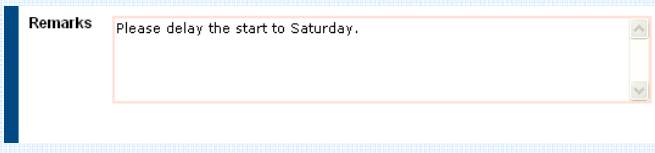
Step 3

To respond to the notification, select your response from the **Response Type** drop down box.



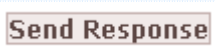
Step 4

If you would like to reject or delay the work, please, provide an explanation in the **Remarks** box.



Step 5

To send the response click **Send Response**.



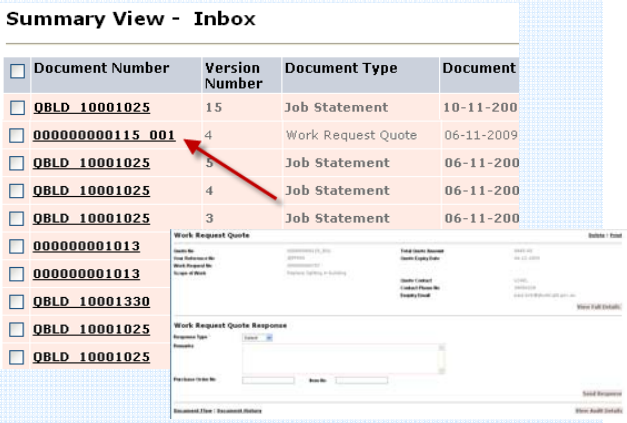
Anything you send on to BAS will display in your **Sent** folder.

5.5.4 Work request quote notification

All ***Work Request Quote*** notifications will reside in your ***Inbox***.
They will be identified as a ***Work Request Quote*** document type.

Step 1

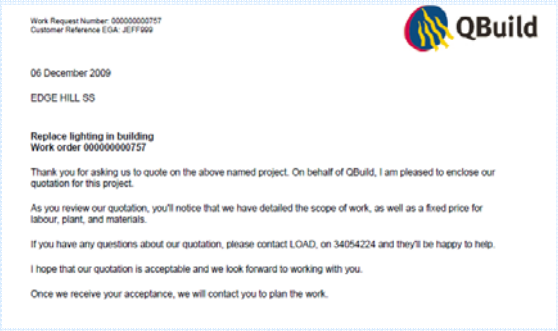
Click on the document number to open the work request quote notification.



Step 2

To view the full details of the quote click the **View Full Details** link.

This will display a document with all the details of the quote for your review.


QBuild
06 December 2009
EDGE HILL SS
Replace lighting in building
Work order 000000000757
Thank you for asking us to quote on the above named project. On behalf of QBuild, I am pleased to enclose our quotation for this project.
As you review our quotation, you'll notice that we have detailed the scope of work, as well as a fixed price for labour, plant, and materials.
If you have any questions about our quotation, please contact LOAD, on 34054224 and they'll be happy to help.
I hope that our quotation is acceptable and we look forward to working with you.
Once we receive your acceptance, we will contact you to plan the work.

Step 3

To respond to the notification, select your response from the **Response Type** drop down box.

Step 4

If you are accepting the quote, you can provide your purchase order at the time of acceptance.
If you are rejecting the quote, please include a comment in the **Remarks** box.

Step 5

To send the response click **Send Response**.

Anything you send on to BAS will display in your **Sent** folder.

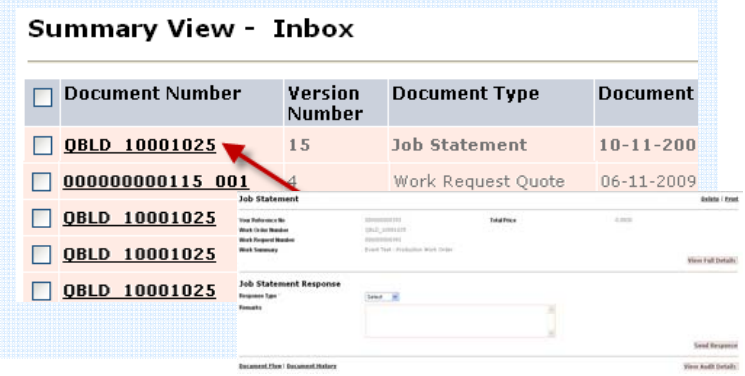
5.5.5 BAS customer job statement

All ***BAS Customer Job Statement*** notifications will reside in your ***Inbox***.
They will be identified as a Job Statement document type.

Job Statement

Step 1

Click on the document number to open the **BAS Customer Job Statement** notification.

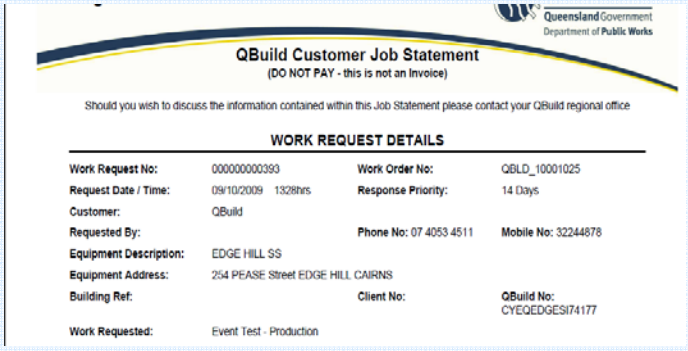


Step 2

To view the **BAS Customer Job Statement** click the **View Full Details** link.

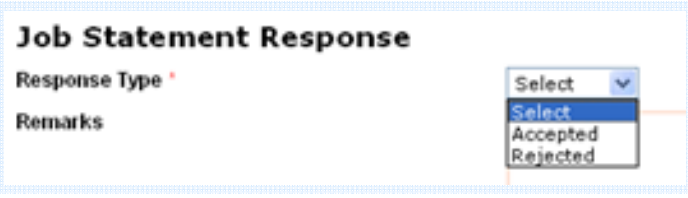
View Full Details

This will display the **BAS Customer Job Statement** for your review.


Queensland Government
Department of Public Works
QBuild Customer Job Statement
(DO NOT PAY - this is not an Invoice)
Should you wish to discuss the information contained within this Job Statement please contact your QBuild regional office
WORK REQUEST DETAILS
Work Request No: 000000000393
Work Order No: QBLD_10001025
Request Date / Time: 09/10/2009 1328hrs
Response Priority: 14 Days
Customer: QBuild
Requested By:
Phone No: 07 4053 4511
Mobile No: 32244878
Equipment Description: EDGE HILL SS
Equipment Address: 254 PEASE Street EDGE HILL CAIRNS
Building Ref:
Client No:
QBuild No: CYEQEDGESI74177
Work Requested: Event Test - Production

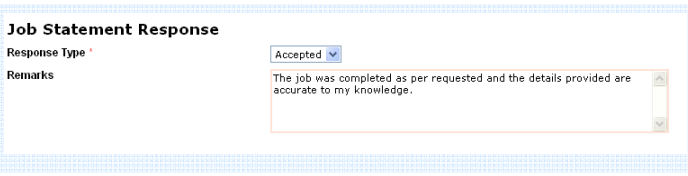
Step 3

To respond to the notification, select your response from the **Response Type** drop down box.



Step 4

If you wish to reject the job statement, please provide an explanation so BAS can respond to your concerns quickly.


Job Statement Response
Response Type *
Accepted
Remarks
The job was completed as per requested and the details provided are accurate to my knowledge.

Step 5

To send the response click **Send Response**.

Send Response

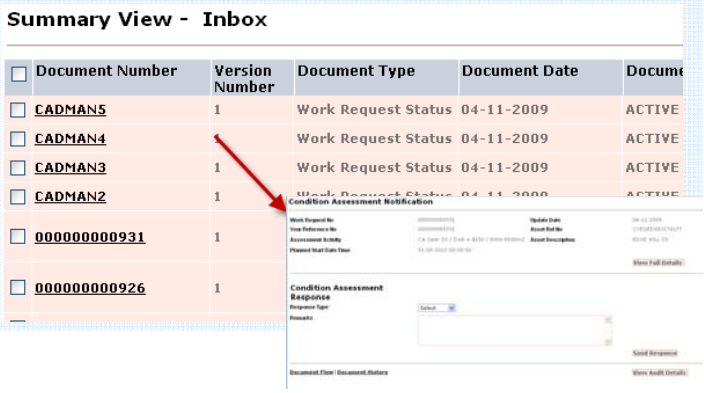
Anything you send on to BAS will display in your **Sent** folder.

5.5.6 Condition assessment notification

All ***Condition Assessment*** notifications will reside in your ***Inbox*.**
They will be identified as a ***Condition Assessment Notification*** document type.

Step 1

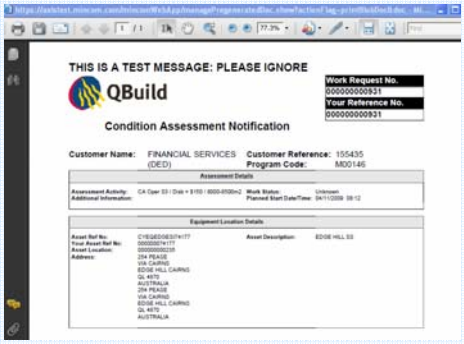
Click on the document number to open the **Condition Assessment Notification.**



Step 2

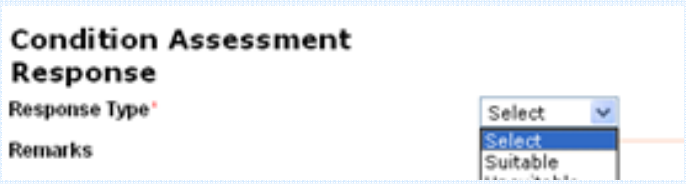
To view the full details of the **Condition Assessment Notification** click the **View Full Details** link.

This will display the full details of the notification for



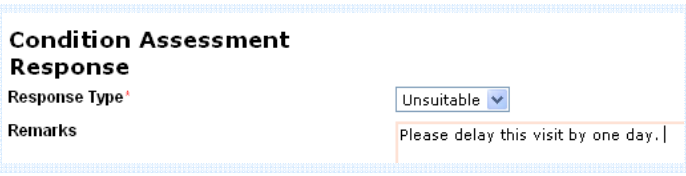
Step 3

To respond to the notification, select your response from the **Response Type** drop down box.



Step 4

If the proposed time for the condition assessment is unsuitable, please nominate an alternative time in the **Remarks** box.



Step 5

To send the response click **Send Response**.

Anything you send on to BAS will display in your **Sent** folder.

5.6 Creating an asset update

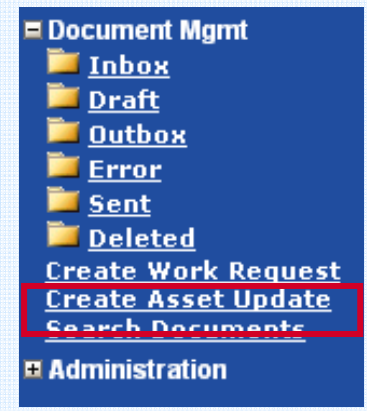
5.6.1 Purpose

To ensure BAS's record of your assets remains current, use the ***Create Asset Update*** function to advise of new assets or updates to existing assets.

5.6.2 Create asset update

Step 1

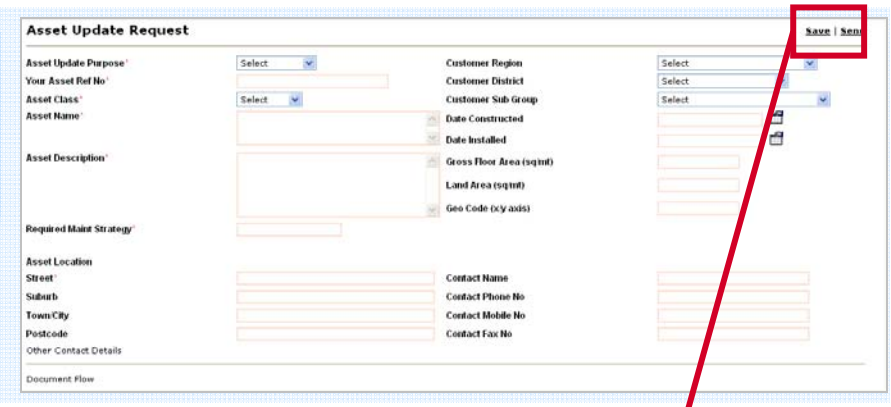
Select **Create Asset Update** from the **BAS Business Online** navigation menu.



Step 2

Create an asset update by completing the fields as described below.

Fields marked with a red asterisk are mandatory.



Step 3

When you have completed your work request, select **Send** from the menu in the top right hand corner.

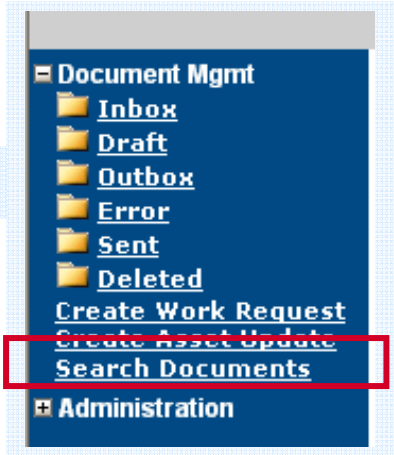
5.6.3 Field descriptions: create asset update

Field	Description
Asset update purpose *	Select from the drop down list. Is the asset update because the asset is new or because you are modifying the details on an existing asset?
Your asset reference no *	Enter your asset reference number here.
Asset class *	Select from the drop down list the type of asset.
Asset name *	Enter the name of the asset here.
Asset description *	Provide a brief description of the asset here.
Required maintenance strategy *	Enter if a maintenance strategy is required.
Street *	Enter the street address for the asset.
Suburb	Enter the suburb in which the asset is located.
Town/city	Enter the town/city in which the asset is located.
Postcode	Enter the postcode for where the asset is located.
Customer region	Select the region that is applicable to you.
Customer district	Select the district, if relevant, that is applicable to you.
Customer sub group	Select the sub-group, if relevant, that is applicable to you.
Date constructed	If relevant, note the construction date.
Date installed	If relevant, note the installation date.
Gross floor area (sq/mt)	If relevant, note the gross floor area, in square metres.
Land area (sq/mt)	If relevant, note the land area, in square metres.
Geo code (x/y axis)	Note the geo code.
Contact name	Enter the name of the person BAS should contact should further information be required.

5.6.4 Field descriptions: create asset update

Field	Description
Contact phone number	Enter the phone number of the person BAS should contact should further information be required.
Contact mobile number	Enter the mobile phone number of the person BAS should contact should further information be required.
Contact fax number	Enter the fax number of the person BAS should contact should further information be required.
Other contact details	Enter in any other relevant contact details BAS should further information be required.

5.7 Searching for documents



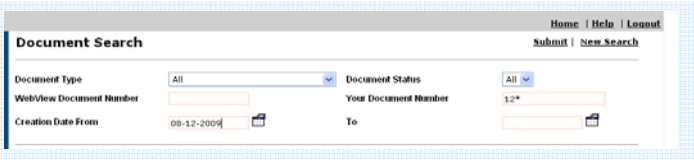
Step 1

Select **Search Documents** from the navigation menu

Step 2

Choose relevant criteria to assist your document search. Selectable parameters are:

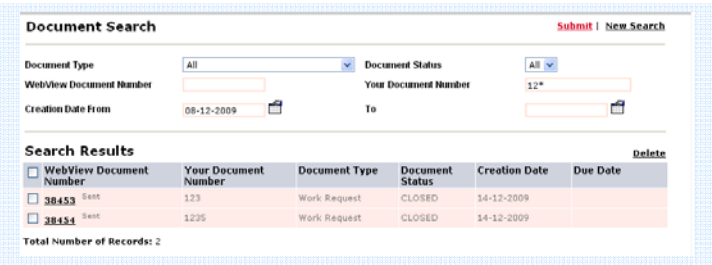
- Document Type
- Document Status
- WebView Document Number (this is the number generated by BAS Business Online for a document)
- Your Document Number
- Creation date from and to.



You can use an asterisk 'wild card' in the document number fields, e.g. 12* will find all document numbers starting with 12 or *1234* will find all document numbers that contain 1234

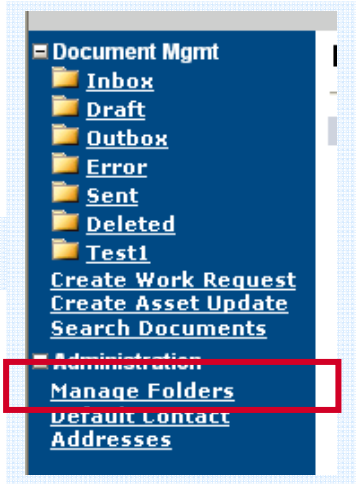
Step 3

Matching search results are returned. Select the document you wish to view by clicking its document number.



5.8 Managing folders

You can create and manage folders in which to store documents.

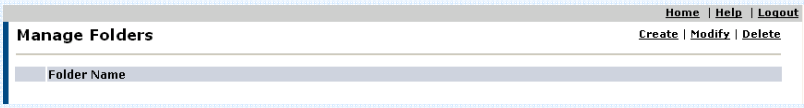


Step 1

Select **Manage Folders** from the administration section of the navigation menu.

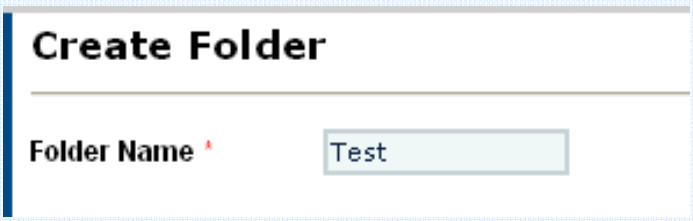
Step 2

Click **Create** to create a new folder.



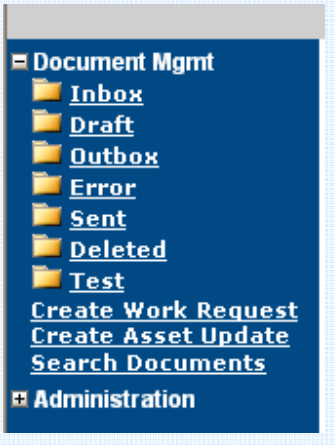
Step 3

Choose a name for the folder.
Click **Save**.



Step 4

A new folder has been created in the navigation list.



Once you have created a folder, you can modify the name of a folder - access create folder and use the modify function.

5 Appendix A: BAS Regions